



Center for Student Financial Planning and Services
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 Franklin MA, 02038
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2020-2021 ASSET VERIFICATION FORM – INDEPENDENT STUDENT

Student Name: _____ Dean College ID#: _____

The asset information you provided on your 2020-2021 Free Application for Federal Student Aid (FAFSA) requires clarification. Please complete this form using asset information *as of the date you filed your 2020-2021 FAFSA*.

PERSONAL AND INVESTMENT ACCOUNTS

<p>Value of Cash, Savings, Checking Account(s):</p> <p>Student: \$ _____ Spouse: \$ _____</p> <hr style="border-top: 1px dashed black;"/> <p>Value Investments:</p> <p>Student: \$ _____ Spouse: \$ _____</p>	<p>Investments include: stocks, stock options, bond, mutual funds, securities, certificates of deposits (CDs), money market funds, trust funds, 529 college savings plans and Coverdell savings accounts</p> <p>Investments DO NOT include: primary residence, the value of life insurance, retirement plans (401K plans, pension funds, non-education IRA's, KEOGH plans, etc.) or UTMA AND UGMA accounts if you were the custodian not the owner</p>
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REAL ESTATE
 Real estate includes rental property, land, second or summer homes. Do not include your primary residence, unless it is a multifamily dwelling

<p>Property Address:</p> <p>_____</p> <p>_____</p> <p>City State ZIP</p>	<p>Multi-family dwelling? (Circle one) YES/NO If yes, percentage that is rental property _____%</p> <p>Total Value: \$ _____ (minus)</p> <p>Total Debt: \$ _____ (equals)</p> <p>Net Worth: \$ _____</p>
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<p>Property Address:</p> <p>_____</p> <p>_____</p> <p>City State ZIP</p>	<p>Multi-family dwelling? (Circle one) YES/NO If yes, percentage that is rental property _____%</p> <p>Total Value: \$ _____ (minus)</p> <p>Total Debt: \$ _____ (equals)</p> <p>Net Worth: \$ _____</p>
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Current net-worth of your business and/or investment farm \$ _____
Don't include a family farm or family business with 100 or fewer full-time or full-time equivalent employees.

Signatures:

Student Signature: _____ Date: _____

Spouse Signature(optional): _____ Date: _____